

# CREW Dallas & CREW in the Community Vendor Payment Process

1. If they need to register a vendor prior to submitting an invoice (outside vendor) or requesting a reimbursement (CREW Dallas member) –
  - a. Send an email to CREW AP Support – [apsupport@crewnetwork.org](mailto:apsupport@crewnetwork.org)
  - b. Copy Melissa Gombert – [melissag@savillecpa.com](mailto:melissag@savillecpa.com), Dabney Jungerman-[djungerman@crew-dallas.org](mailto:djungerman@crew-dallas.org), (Committee Chair and Committee Director on email
  - c. Include the following in the email:
    - i. Vendor Name
    - ii. Vendor Contact Name if vendor is not an individual
    - iii. Vendor email
    - iv. Specify whether related to CREW Dallas or CIC
  - d. Request that the vendor be set up in the Tipalti system
  - e. Attached is a Tipalti registration guide from Network that can be shared with the vendor as to what to expect once they receive their registration email from Network
    - i. NOTE – No payments can be made to a vendor without Tipalti registration, so letting the vendor know that when communicating with them is key.
2. If they need to submit an invoice (outside vendor) for payment –
  - a. Same process as before –
    - i. Use the expense voucher forms found in Teams under General: Forms: 2025 Expense Forms – these have been updated to show our current chart of accounts
    - ii. Submit through committee for approval – once committee chair and board member have approved, send completed expense voucher form as well as receipts to Melissa Gombert – [melissag@savillecpa.com](mailto:melissag@savillecpa.com) – for review and submission to CREW Network for payment
    - iii. Include the vendor's name, contact name, and email on the expense voucher request form or in the email
3. If they need to submit a reimbursement (CREW Dallas member only) –
  - a. They can submit using the Formstack link below –
    - i. **CREW Network Expense Voucher** ([https://crewnetwork.formstack.com/forms/expense\\_voucher\\_copy](https://crewnetwork.formstack.com/forms/expense_voucher_copy))
    - ii. Select either CREW Dallas or CIC from the dropdown menu
    - iii. Include all relevant information related to the account the charge should be recorded to and the amount
    - iv. Attach relevant receipts
  - b. We are working on this part of the process to confirm approvals have still been following within committees – for now (while we are confirming that process), they can continue to use the expense voucher and email to Melissa Gombert – [melissag@savillecpa.com](mailto:melissag@savillecpa.com) – once they obtain appropriate committee approvals.

Thursday, August 21, 2025

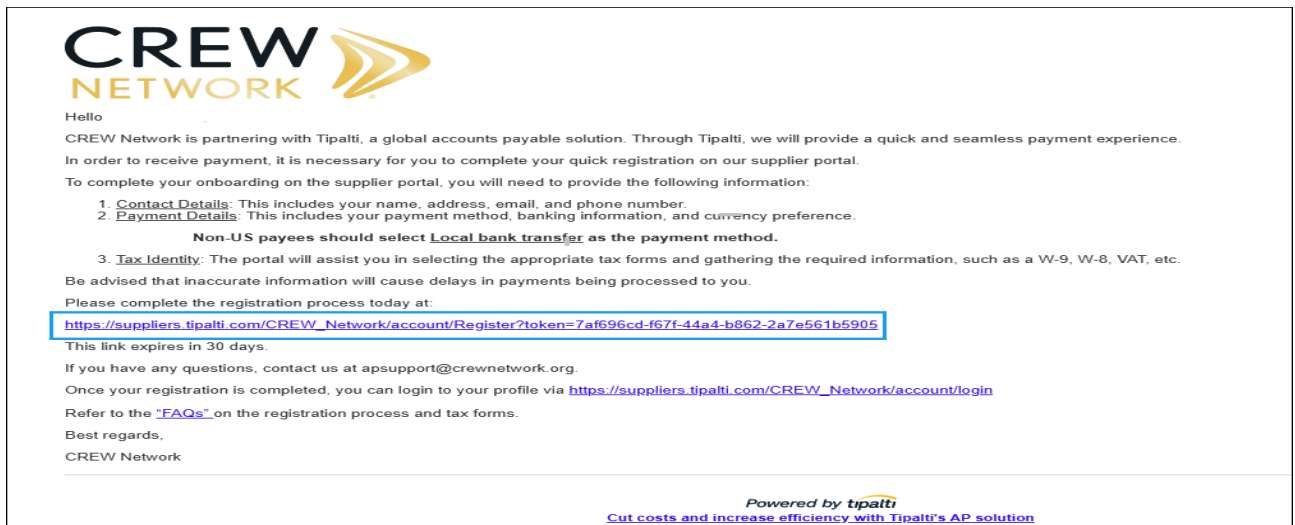


## Tipalti Registration Guide for Vendors

Please have your bank account and W-9 information available before starting this process.

### 1. Check Your Email

You'll receive an email from [apsupport@crewnetwork.org](mailto:apsupport@crewnetwork.org) with a unique registration link. The link will expire in 30 days. The email will include your Chapter's name and logo.



### 2. Create Your Account

Click the link and follow the instructions to create your Tipalti account.

Get paid easily with  
Tipalti's Supplier Hub

**CREW NETWORK**

Email address

Password

Confirm password

Security question  
In what city or town was your ...

Security answer

**Register**

Already signed up? [Login here](#)

**REGISTRATION COMPLETED**

Thank you for registering. [Click here to login.](#)



### 3. Two-Step Verification

Click on the link to login and complete your 2 Step Verification.

|   |   |  |
|---|---|--|
| <p>Get paid easily with Tipalti's Supplier Hub</p> <p><b>CREW NETWORK</b></p> <p>Email address<br/><input type="text"/></p> <p>Password<br/><input type="password"/></p> <p><a href="#">Forgot password?</a></p> <p><b>Login</b></p> <p><small>By logging in, I agree to the <a href="#">Payee Agreement</a> and consent to the use of my information in accordance with Tipalti's <a href="#">Privacy Policy</a>.</small></p> <p>Want to pay your suppliers more efficiently?<br/>We can help! <a href="#">Discover how &gt;</a></p> | <p>Get paid easily with Tipalti's Supplier Hub</p> <p><b>CREW NETWORK</b></p> <p><b>2 Step Verification:</b> In order to increase your account security, you are required to activate a 2-step verification mechanism using both your password and a verification code.</p> <p>Select country: <input type="text" value="United States (+...)"/></p> <p>Your mobile number: +1 - <input type="text"/></p> <p>The verification code will be sent to your mobile device via text message.</p> <p><b>Send code</b></p> | <p>Get paid easily with Tipalti's Supplier Hub</p> <p><b>CREW NETWORK</b></p> <p><b>2 Step Verification:</b> A verification code has been successfully sent to your mobile device.</p> <p>Your mobile number: <input type="text"/> <a href="#">Change</a></p> <p>Verification code: <input type="text"/></p> <p><b>Verify</b></p> <p><a href="#">Resend code</a></p> |
|---|---|--|

### 4. Enter Your Business Info

Fill in your company name, address, contact details, and any other required information.

***If you're an individual requesting reimbursement, you can simply enter your name and personal contact information instead of business details.***

**Payment Details**

**Payment History**

**Invoice History**

**Submit an Invoice**

**Discover Tipalti**

**1** Address    **2** Payment Method    **3** Tax Forms    **4** Done

**Enter Your Information**  
To ensure that you receive your payments on time, please enter your details as you shared them with your bank. P.O. Box not allowed. ⓘ

Type    ☒ Individual    ☐ Company

Contact Email

Phone Number ⓘ

First Name ⓘ

Middle Name

Last Name ⓘ

Street Address

Address 2

City

Country

ZIP

**Next**



## 5. Add Payment Details

We use ACH (bank transfer) for all payments, so please provide your bank account details to receive payments directly.

Payment Details

Payment History

Invoice History

Submit an Invoice

Discover Tipalti

Address Payment Method Tax Forms Done

Payment Method: Direct Deposit / ACH

Name on Account

Bank Name

Routing Code

Account Number

Account Type ☒ Checking ☐ Savings

No transaction fees.

☒ Agree to Tipalti's Terms of Service and Tipalti's Privacy Policy.

Back Next

## 6. Submit Tax Forms

Tipalti will guide you to the correct tax form (e.g., W-9, W-8BEN). Fill it out and submit it electronically.

***If you're only receiving a reimbursement for an expense, you can skip this step.***

Address Payment Method Tax Forms Done

Select Your Tax Form

We are required to collect tax forms from our payees. Please select a tax form.

Need help? Tax form questionnaire

☐ W-8BEN - for non-US individuals

☐ W-8BEN-E - for non-US corporations

☒ W9 - for US individuals/entities

☐ Other

Complete Form



Payment Details

Payment History

Invoice History

Submit an Invoice

Discover Tipalti

Address

Payment Method

**3**

4

Address

Payment Method

Tax Forms

Done

CREW NETWORK

Please continue to fill the W-9 form below: [To submit a different tax form, click here.](#)

Substitute Form  
**W9**

Request for Taxpayer Identification Number and Certification

Rev. March 2024

Name (individual or company name as shown on your income tax return)

Business Name/Disregarded Entity Name (if different from above)

Check appropriate box:

- ☒ Individual/sole proprietor
- ☐ C Corporation
- ☐ S Corporation
- ☐ Partnership
- ☐ Trust/estate
- ☐ Limited liability company. Enter the tax classification:

Note: Check the "LLC" box above and enter the appropriate tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.

☐ Other (Only list entity type not listed above) [\(see instructions\)](#)

Exemptions (codes apply only to certain entities, not individuals):

Exempt payee code (if any)

Exemption from FATCA reporting code (if any)

(Applies to accounts maintained outside the U.S.)

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Next

These forms are provided solely for your convenience and are not intended to provide you with tax advice. You should seek advice for your particular situation.

## 7. Review and Submit

Double-check that everything is accurate, then submit your registration.

Payment Details

Payment History

Invoice History

Submit an Invoice

Address

Payment Method

Tax Forms

**4**

Address

Payment Method

Tax Forms

Done

CREW NETWORK

DONE

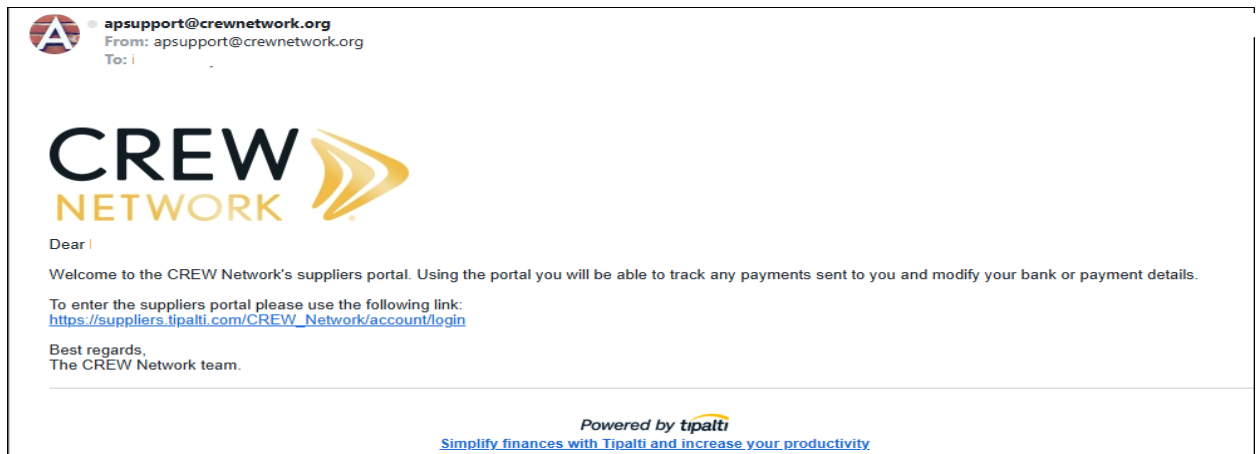
You are all set. Payments will be made per your selections.

If you want to review your information, press the back button to review previous steps.  
If you wish to edit any details, click the edit button on the appropriate form. After editing please proceed through all the steps again until this final confirmation.



## 8. You are all Set!

You'll receive a welcome email from your Chapter with a link you can use to track payments and update your account information if needed.



## 9. Important: Send all Invoices to your Chapter Treasurer:

While Tipalti has a feature to upload invoices, **please do not use it**. Instead, email all invoices directly to the Chapter Treasurer.

